### Goal of the Portal

"Establish immediately a mechanism, including an internet website, through which a resident of, or small business in, any State may identify affordable health insurance coverage options in that State"

### Statutory Basis

 The Patient Protection and Affordable Care Act (P.L. 111-148), (Affordable Care Act) enacted on March 23, 2010. Section 1103(a), as amended by section 10102(b)

 Health Care Reform Insurance Web Portal Requirements, 45 CFR Part 159, 75 FR 24470



- Explain the data request
- Provide Technical Training on Data Entry
- Answer questions

### Nature of Request

- Trying to Minimize the Burden
  - Medicaid, CHIP from CMS
  - High Risk Pools through agreement with NASCHIP
  - Details from Issuers
- Major Medical Product Filings
- Information on how consumers can reach the state

### Request for July 1st Release: General Information

- Contact Information and Guidance
- Does State Use Community Rating or Medical Underwriting
- Does your state have an online comparison tool where we should direct consumers
- If not is there another online site where we should direct consumers for health insurance information
- Contact Information for data submission
- Contact information for data validation

# Request for July 1st Release: Issuer & Product Information

- Issuer Name
- Type of product by market (individual / small group)
- Who is your contact with the Issuer
- Number of products offered by type:
  - Fee for Service
  - HMO
  - PPO
  - EPO
  - POS
  - Other

#### **Dates**

Training: Today, May 7, 2010

Send Log-In information: May 6

Start data entry: May 6

Help Desk Opens: May 7

Deadline for Submissions: May 21

Open for Validation: May 21

Release: July I

# Issuer Requirements

#### For July I Release

- Contact information
- List of All products from state form filings
- Market type and product type
- Whether they are open for enrollment / number enrolled
- Link to benefit summaries

#### For October Release

- All open plans
- Benefits
- Pricing
- Plan contact Information

# Support

If you need additional assistance, please call the HIOS Help Desk at I-877-343-6507

or email them at <u>insuranceoversight@hhs.gov</u>.

# Initial Submission State Data Submission Template

- You will receive an Excel template and technical instructions on how to complete the data entry.
- Once completed and prior to May 21, 2010, you should email your template to hios\_submissions@hhs.gov
- Towards the middle of May, we will begin to process the templates. You will receive an email that either indicates a successful submission or highlights errors with your submission.
  - If there are errors with your submission, you will need to correct the file, and submit the entire corrected file to the same email address.

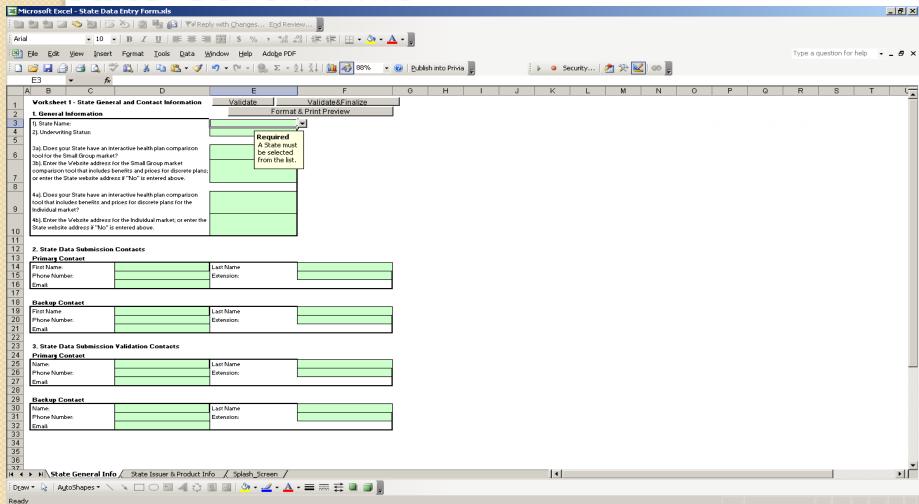
# System Requirements

- Excel 2003 or greater
- We recommend the following for your macro settings:
  - Excel 2003 Security set to Medium. Select 'Enable Macros' upon opening the file
  - Excel 2007 Security set to 'Disable all macro with notification'. You must enable the content prior to opening the file

### State Data Submission Template

- The state template has 2 tabs:
  - General State Info
    - Gather data about the submitting state and contact information.
  - Issuer & Product Info
    - Gather data about the different issuers in the corresponding state and quantify their offerings within the state.

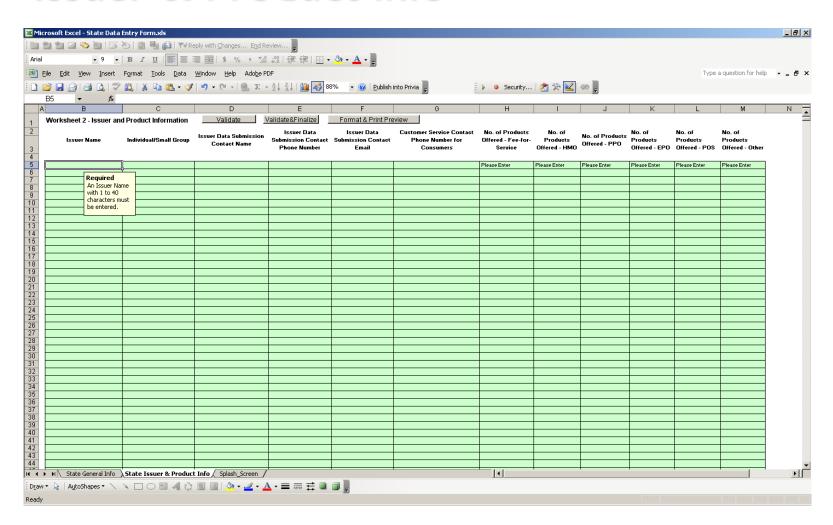
# Data Entry State General Info





- All fields are required with the exception of the back up contacts.
  - Even though not systematically required, we encourage the data entry of back up contacts.
- If your state does not currently offer comparative online tools, please enter No into cells E6 and E8 and enter your state website address into cells E7 and E9.
- If your state offers interactive online tools, this data will be made public on the web portal.

# Data Entry Issuer & Product Info



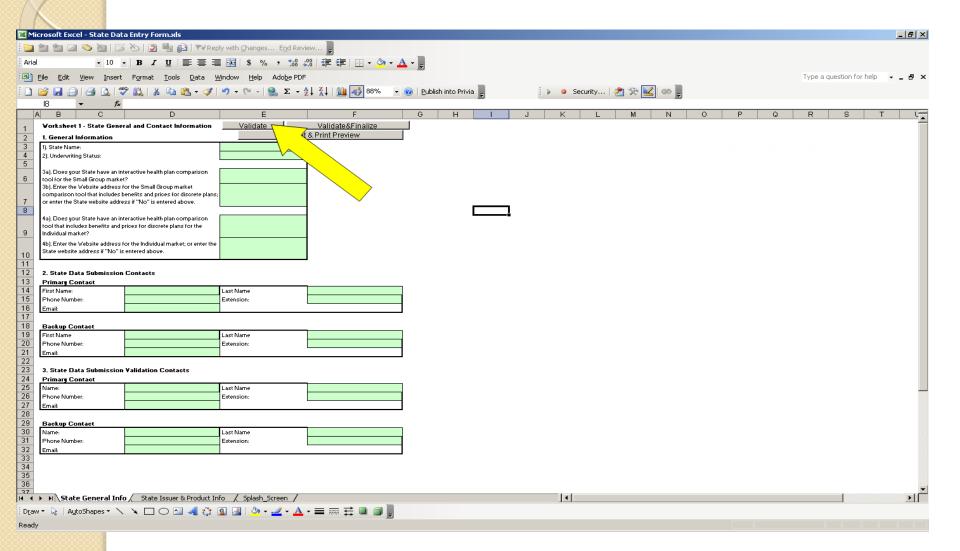
# Data Entry Issuer & Product Info Tab

- One row per combination of Issuer/Market type.
- If an Issuer covers both the Individual and Small Market group, you will need to enter 2 rows for that issuer.
- Columns H M are required; If the issuer does not have any offerings for that product type, enter 0.

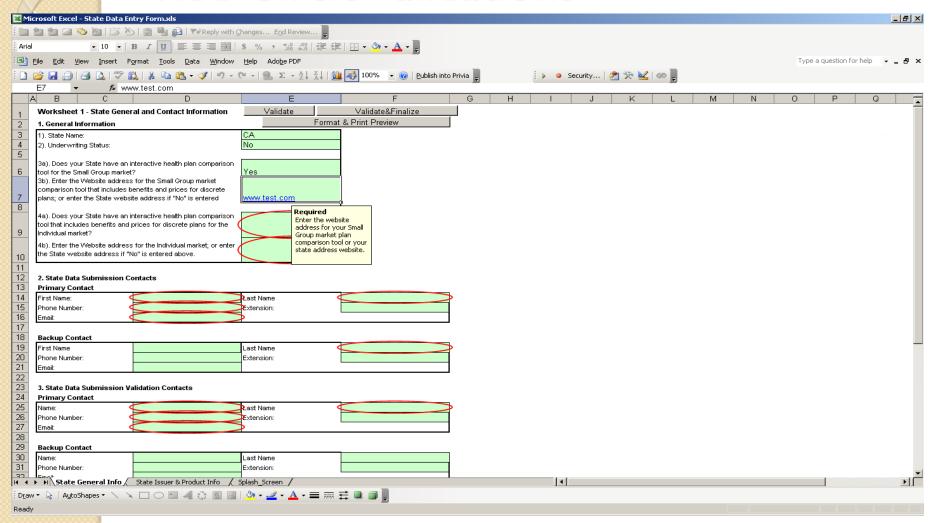
# Validating your Data

- The State Data Entry workbook has validations built in to help you validate the correctness and accuracy of your data prior to submission.
- It is strongly recommended that you validate your data throughout the data entry process by clicking on the 'Validate' button or by clicking CTRL+SHIFT+V.
- Red circles will appear surrounding the cells that require your attention. A message box will also describe these errors.

# Validating your Data



### Validating your Data Red Circle Validations



### Correcting your Data

- In some cases, the red circle will disappear upon correcting the data.
- In other cases, you will need to click "Validate" again to verify that the red circle is no longer valid.
- Once you have no red circles, you are ready for the finalization process.

# Finalizing your File

- Once all the data is entered and validated, click "Validate&Finalize" or click CTRL+SHIFT+S.
- If there are critical validations that fail, the file will not finalize and an error message will appear.

#### Finalization – Critical Errors



# Finalizing your File

- Once all critical errors have been checked, the finalization process will continue:
  - A new READ ONLY file will be created in the same location as your working file.
  - This file will be generated based on a special naming convention.
    - If you modify the name of the finalized file, it will not be processed.
    - You may name your working file as you wish.
  - YOU MUST SUBMIT YOUR FINALIZED FILE.
     DO NOT SUBMIT YOUR WORKING FILE; IT
     WILL NOT BE PROCESSED.

### Next Steps

- Once your file is processed, you will either need to correct the data and resubmit, or verify your data online.
- Online verification of data will be available on 5/21/10. Website information will be made available prior to that date.
- In the near future, you will be able to upload your files directly to the website, as well as edit online.

### Access to the Website

 The data submission and validation contacts contained in your submitted templates will be granted access to the Health Insurance Oversight System.

### Questions?

 Please contact the HIOS Help Desk at insuranceoversight@hhs.gov